Overview of Expense Module Improvements

Finance Division
Agenda

- Background of Changes
- System Improvements
- Key Features at a Glance
- Additional Resources
Why did we make improvements to the Travel and Expense reimbursement process?
- Acted on the feedback from Travel and Expense users
- Positive impact for the Campus

Tremendous team effort to delivered the improvements

Delivered on time and will go live March 1, 2011!
Project Background
The Business Case

- Streamline workflow process
- Minimize lost documentation
- Adherence to policy
- Expand accounting information
- Reduce denial rates
Improvements to Expense Module

- **Green Project**
  - Attach > Upload
  - Reduce copy and printing – Overall
  - Decrease paper flow

- **Enhanced Communications**
  - Messaging up front
  - Messaging in body of application
  - Messaging for approvers
Improvements to Expense Module Cont.

- Adoption of industry best practices
  - Using software as designed
- Streamline Workflow*
  - Departments initiate approval
  - Denials resubmitted on or after March 1st processed through new workflow

* University Only
Improvements to Expense Module Cont.

- Improved accounting and reporting
  - Single click to view accounting summary
  - Expanded expense types
  - Manager Views – shows reports by employee and all reports charged to department

- Simplified receipt requirements
  - Departments retain originals*
  - Summary receipts for meals less than $25.00

*NRA – Originals mailed to Controllers Office
4 Improvements at a Glance

- Upload and attach documents
- Simplified receipt requirements
- Enhanced accounting features
- Workflow begins with departments
Additional Resources

- Website  [www.finance.emory.edu](http://www.finance.emory.edu)
- Procurement Customer Care
  - 404-727-5400
  - actspay@emory.edu
- Sign up for Training : [www.emory.edu/elms-training/](http://www.emory.edu/elms-training/)
- Online Reference Guide : [www.compass.emory.edu](http://www.compass.emory.edu)
- Training Materials : [www.finance.emory.edu/home/training/](http://www.finance.emory.edu/home/training/)